Localore: Finding America Research
Summer/Fall 2016

During the summer and fall of 2016, Edison Research conducted three studies on behalf of the AIR, in partnership with Greater Public, ITVS, NFCB, and PRPD, called the Localore project: exit polling at six live events, a market study of persons living in the 15 Localore markets, and an online survey of the community collaborators who worked with AIR's local producers in those markets. Our goal was to better understand the needs of the communities served by Localore, the differences between the public media audience and those who do not consume public media, and how public media could better serve both communities at the local level.

Both the market study and the survey of community collaborators were conducted in the following markets served by Localore:

- Anchorage, AK
- Baltimore, MD
- Bellevue, WA
- Birmingham, AL
- Durham, NC
- Kansas City, MO
- Knoxville, TN
- Milwaukee, WI
- New Orleans, LA
- Philadelphia, PA
- Richmond, VA
- Tusla, OK
- Tucson, AZ
- Washington, DC
- Watertown, NY

Exit polling was conducted at the following events:

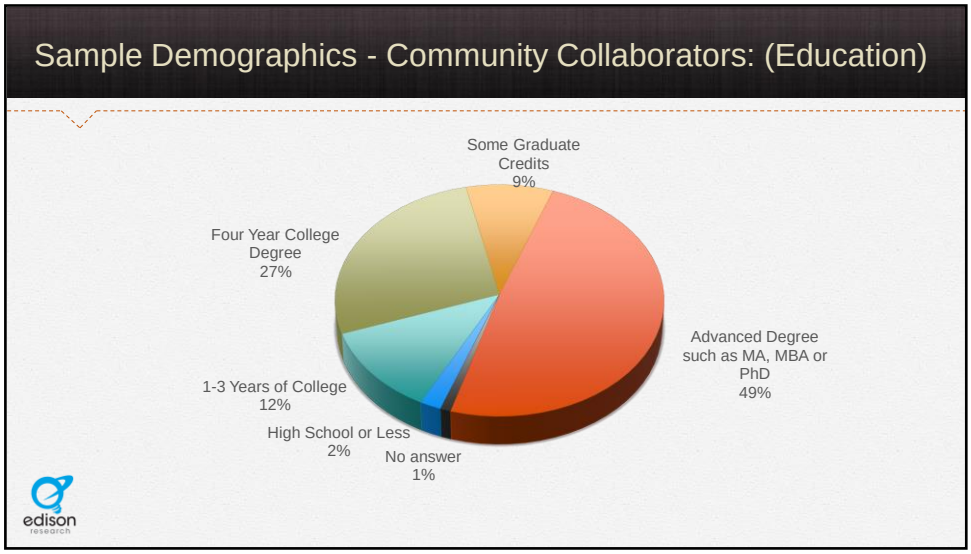
- Every ZIP Philadelphia & the Village Storytelling Block Party in Philadelphia, PA
- Beyond Belief Viewing Party in Kansas City, MO
- Secretly Y'all, Unmonumental and Untold RVA Present: Secret Stories of Self-Determined Change in Richmond, VA
- "Roane is Better Together": A TruckBeat storytelling night in Harriman, TN
- Dímelo's End of Year Celebration Party in Tuscon, AZ
- Unprisoned BYO Live: "When the Young Feel Old" in New Orleans, LA

The Localore events were an important part of this project, as they provided a different demographic component to the overall study. Specifically, event attendees were younger, indexed more female, and were ethnically more diverse than both the markets in general and the public media consumers from those markets. They were also highly representative of the local areas in which the events were held—half lived within five miles of the event, and a third between five and fifteen miles.

Complete methodologies, demographics, and the results of all three studies have been delivered under separate cover; this document represents a summary of the main themes uncovered by these three studies.

I. Community Collaborators – Opportunities and Limitations

The community collaborator study was interesting mainly for the bias we observed in terms of the sample's composition. These collaborators were the heaviest consumers of public media, were markedly wealthier, and had attained significantly higher levels of education than the market respondents or the event attendees. They were also much more likely to donate to public media and other altruistic behaviors. Their media consumption behaviors were also not representative of the market at large—they were far more likely to consume news via Internet, more interested in International news, less inclined towards music and entertainment content. Television in general was less important as a media source to these Internet-savvy individuals.

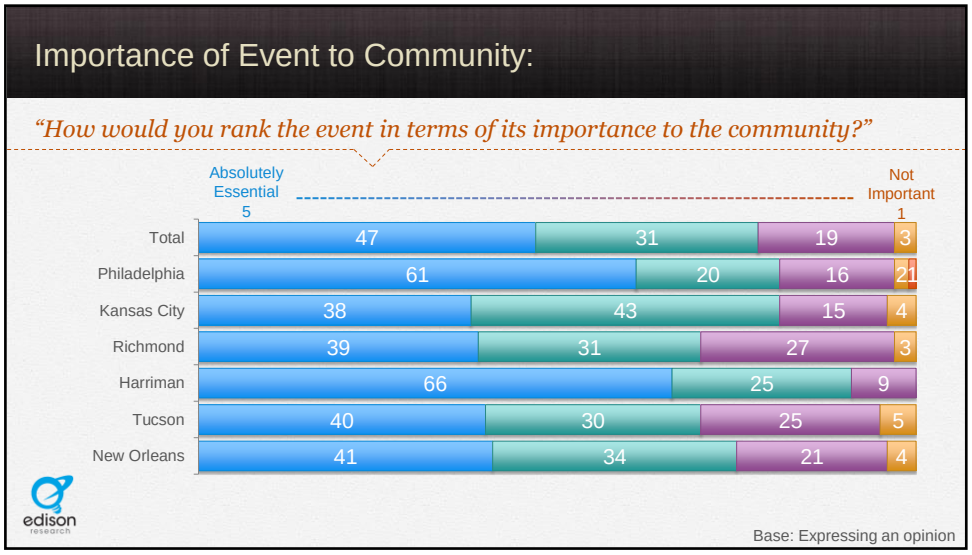


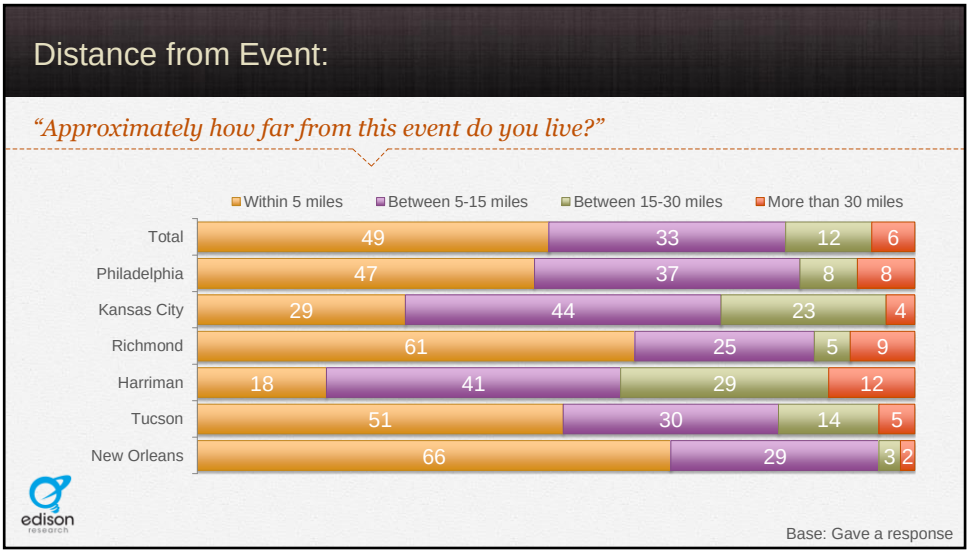
AIR, its local producers, and the local public media outlets carrying Localore should continue to cultivate this network of "influencers"; clearly, they are "switched on," supportive of public media, and influential. However, the local producers should also be encouraged to reach outside of this network to gather stories and viewpoints from those in their community who are truly not being served (or perceive that they are not being served) by public media. Many of the non-public media listeners in our market study were economically disadvantaged, and may hold a markedly different view of public media and the population it serves than the people who currently give the most to public media.

In short, this is an important time for public media to assert its relevance to America and communities nationwide. It is clear that the Localore events are giving us inputs and a flavor that public media is not getting from its donors, supporters, or most avid listeners. Continuing these events, gathering voices and stories from attendees, and reaching beyond the "filter bubble" of our community collaborators (while continuing to cultivate their engagement) will all be crucial components to both AIR and to the role that Localore initiatives can play to the local stations that carry them.

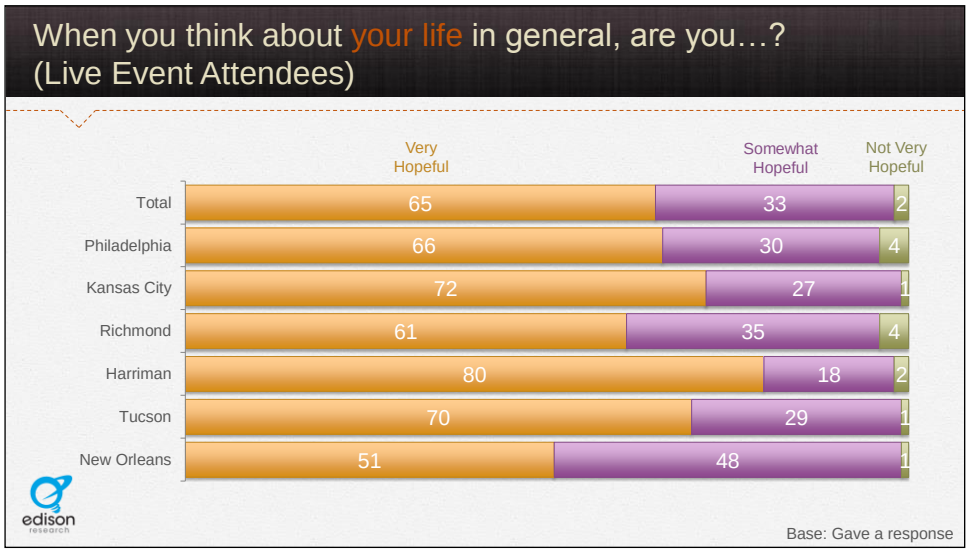
II. Localism

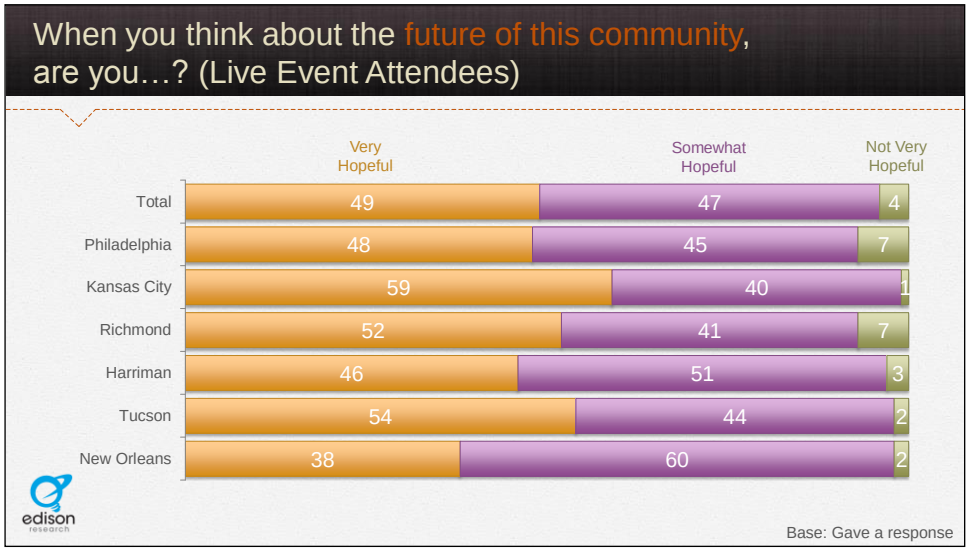
The events were extremely well regarded and perceived as important to the communities in which they were held. We learned that the attendees for these events skewed much younger, and more female, than the typical audience for public media. They tended to live very close to the event locations, and were economically not as well off as the public media audience in general for those markets.



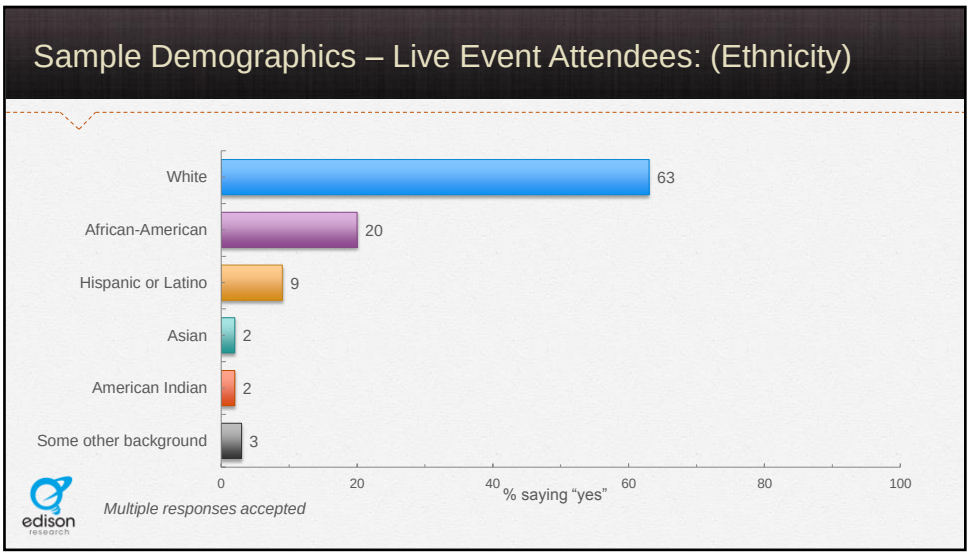


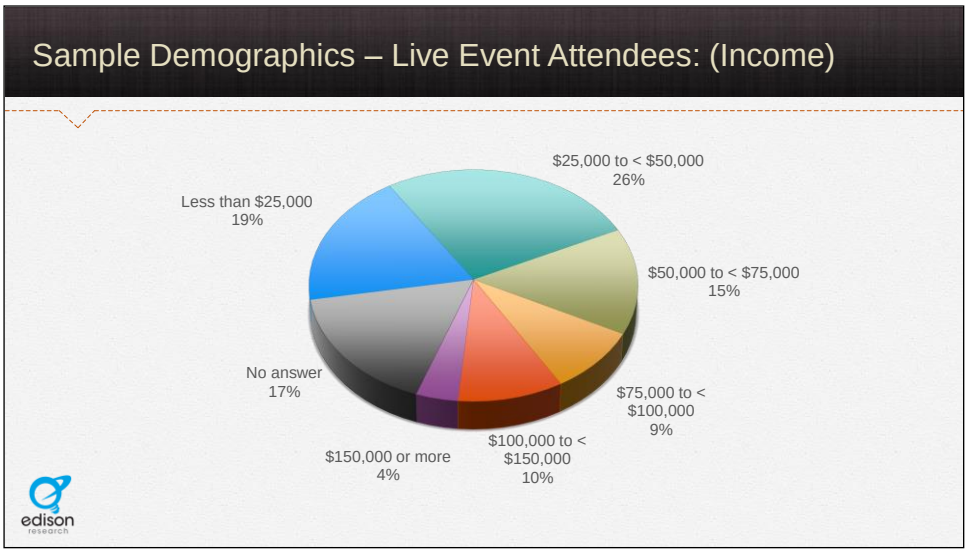
We believe these events are crucial for Localore and local public media precisely *because* of these attendees. They revealed an optimism both for their own lives and for their communities that was unmatched in the market or community collaborator studies.





They were also much more diverse (from both an ethnic and socioeconomic standpoint) than either of the other two populations surveyed. While the community collaborator network is crucial to AIR to help promote activism and awareness of local issues, it is vital to tap into this truly local resource—the event attendees themselves—to get them to share their stories and engage with public media.

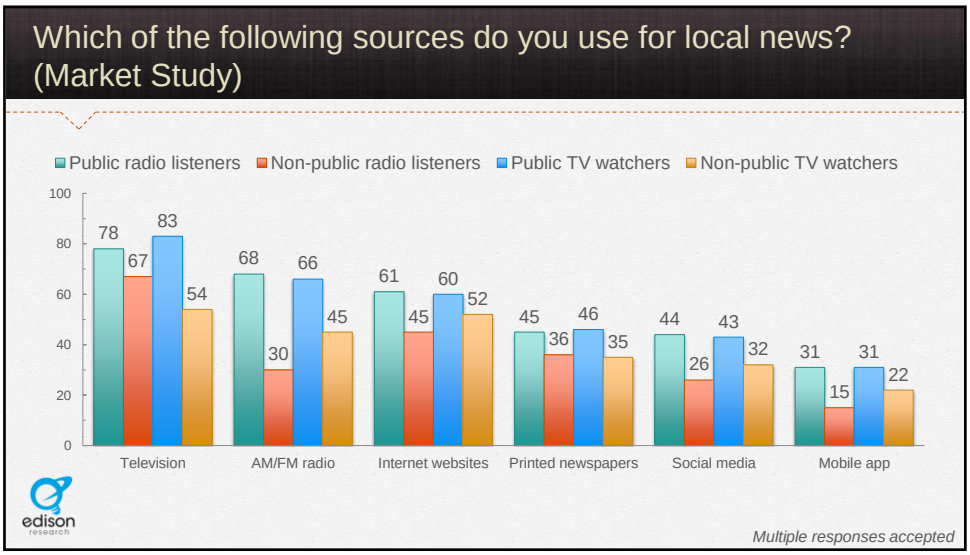




III. Public Media Perceptions

In general, all three studies showed very high usage of public radio, and somewhat less usage of public television. In the case of the former, traditional broadcast, over-the-air radio listening continues to be the dominant form of public radio consumption, though the community collaborators did index very highly for Internet streaming of public radio.

Though public television consumption was lower than public radio consumption, both the market studies and the event attendee study showed that television was the primary source for local news consumption. There does appear to be a gap between public television consumption, and usage of television in general for news (especially local news.) This points to an opportunity for public television to strengthen its news images.



IV. Content

There were few differences in either perceived or desired content amongst the three samples, but some interesting things emerged nonetheless. For all three samples, local news and information was deemed a very important content type; however, only the event attendees (for somewhat obvious reasons) had a strong top-of-mind perception for public media as a "local" media. Amongst the market and community collaborators, one could make the case that public media is currently punching below its weight as a provider of local content.

The other striking finding amongst all three groups, regardless of education or economic level, was the strong desire to hear fewer negative stories or stories about crime, and to hear more positive news (though specifically not "fluff" pieces.) As we have come out of a very divisive political period in America, and with the increased scrutiny upon the media's role in that divisiveness, we would take these respondents at their word. Stories about local economic empowerment, for example, would seem to check all of the boxes here.

When it comes to news coverage of local events, what do you want less of?

Response	Market Study	Live Event Attendees	Community Collaborators
Crime	12%	10%	12%
Negative/bad news	9%	6%	4%
Human interest/fluff	8%	7%	6%
Politics and election news	7%	5%	3%
Sports	5%	4%	7%
Bias/inaccuracies	4%	3%	3%
Sensationalism	3%	0%	4%

When it comes to news coverage of local events, what do you want more of?

Response	Live Event Attendees	Community Collaborators
Local/community news and events	21%	19%
Happy/positive news	11%	10%
In-depth/investigative reporting	4%	9%
Arts and culture	6%	4%

Recommendations

1. **Both Localore producers AND local public media outlets should continue to cultivate community collaborators—but be aware of the filters through which they view our communities.**

   The community collaborators with whom Localore producers worked to uncover local stores are extremely valuable, not only to this project, but to local public media outlets in general. The local producers have clearly identified people who are active in their community, give both time and money to causes they believe in, and are very heavy consumers and supporters of public media.

   We should, however, understand that these connected individuals are not reflective of the demographics of our local communities—or indeed, even of the typical public media listener. Public media outlets must be diligent to expand the scope of their inquiries, and ensure that these voices, while important, are not the only ones we weave into our local stories.

2. **Local events are important for public media—not only to raise awareness and support, but also to hear some crucial voices we may be missing.**

   As noted earlier, the demographics for the events were markedly different to the markets in general or even the public media consumers in those markets. They were ethically and economically far more diverse than the average public media listener, and therefore representative of an active part of the public media universe that often does not get heard from in public media. These free, very local events brought out a highly different group of people than the community collaborators; yet these people are no less active in the sense that they will go out to an event like this, will share their opinions and voices (our response rate for the event attendee project was incredible) and they are also incredibly optimistic about their communities. Finding out the causes and triggers for that optimism would be a key insight for any local public media outlet.

   Gatherings like the Localore events also serve to humanize public media during a time in which the media is having some clear perception problems.

3. **Now is a great time for pubic media to emphasize the credibility of its news and journalism.**

The respondents from all three studies were clear about what they wanted more, and less of. These studies were all completed prior to the U.S. Election, but close enough that the airwaves have been saturated with a wide variety of divisive rhetoric, and the specter of "fake news." Our respondents clearly wanted to hear more positive stories, less about crime and violence, but not "fluff."

Public media has a window of opportunity here to increase its efforts to root out and produce powerful, positive, and *local* stories that serve to plant a flag for credible news during a time in which the media's trustworthiness is at a low point. We did observe that public media consumers (and especially the event attendees) are actually more positive about their lives and communities than non-public media consumers—the steady drumbeat of negative and divisive stories shared online and in mainstream media is likely not helping that optimism.

About Edison Research

Since its founding in 1994, Edison Research has conducted over 11,000 research assignments in 38 countries. Edison works with a broad array of commercial clients, governments and NGOs, including AMC Theatres, The Brookings Institute, Disney, The Gates Foundation, Google, the U.S. International Broadcasting Bureau, Oracle, Pandora, The Pew Research Center, Samsung, Siemens, SiriusXM Radio, St Jude Children's Research Hospital, and Univision Communications.

With an expertise in both quantitative and qualitative research, Edison Research utilizes telephone, Internet, and in-person research as well as focus groups and ethnographies to execute custom research studies. We work with clients to thoroughly understand their objectives and develop a methodology and questionnaire that will fulfill those goals. While we know how to perform complex research, the results and insights that we deliver are clear, comprehensive and easily understood.

Edison has conducted national surveys measuring everything from public opinion to podcast downloads. Edison's work in public opinion research includes an ongoing survey of Economic Anxiety in America, conducted in conjunction with American Public Media's renowned Marketplace program, as well as work with the National Center for Disaster Preparedness, The Gates Foundation, and Univision. Our industry studies The Infinite Dial (now in its 25th iteration) and Share of Ear® are two of the most widely-cited studies in the audio space.

Since 2003, Edison Research has been the sole provider of exit poll information to ABC, CBS, CNN, FOX, NBC and the Associated Press, having conducted exit polls and collected precinct vote returns to project and analyze results for every major presidential primary and general election. Edison recently completed its 2016 Presidential Primary coverage, and its General Election coverage. This exit poll is the largest single-day survey research project in the world, with more than 100,000 interviews.

Edison is also the leading provider of consumer face-to-face research and has conducted studies in almost every imaginable venue. Edison Research has conducted commercial research at locations including sporting events, movie theaters, shopping malls, golf courses, restaurants, parking garages, school buses, truck stops, airports, cruise ships, office buildings, conventions and conferences, subway stations, bus stations, casinos, museums, health clubs, and medical centers. Edison's network of more than 18,000 experienced interviewers allows us to conduct research in almost any location.

Edison's core talent in exit polling has led international media and civic organizations to hire Edison to conduct exit polls in such places as Azerbaijan, Mexico, the Republic of Georgia, and Venezuela. Edison Research conducted the first exit poll ever done in Iraq, with its survey for the 2014 Parliamentary Election. These international exit polling projects have provided election analysis as well as a mechanism to help validate the propriety of election results.

Another specialty for Edison is our work for media companies throughout the world, conducting research in North America, South America, Europe and Asia. Edison Research has established itself as one of the primary providers of research to European broadcasters, conducting projects in Australia, Austria, Belgium, Bulgaria, Czech Republic, Denmark, England, Finland, Germany, Hungary, Iceland, Republic of Ireland, Northern Ireland, Russia, Scotland, Switzerland, Turkey, Ukraine and Wales.

Working with both government and commercial clients, Edison has broad experience in the Middle East and Africa. Projects have been conducted in Bahrain, Congo, Egypt, Iraq, Ivory Coast, Jordan, Kenya, Kuwait, Lebanon, Mali, Mauritania, Morocco, Niger, Pakistan, Qatar, Senegal, Tunisia and the UAE. We have interviewed more than 200,000 people in the region since 2004.